



**Dena R. Diorio
County Manager
FY2015 Work Plan**

July 1, 2014

Strategic Agenda: High Performing Organization FY2016 County Budget	
Description:	Develop and submit for adoption the FY2016 Mecklenburg County Budget
Rationale:	The County Budget drives the activities that support the community needs. The Manager is tasked with developing and proposing a budget based on her understanding of the needs of the community, the organization operational and fiscal capacity and the interests of the Board.
Timeline:	Budget Adoption is June 2015
Updates/Project Milestones:	<ul style="list-style-type: none">• Lead/Organize a high quality budget planning retreat for the Board of County Commissioners.• Engage Board members, business partners, community stakeholders and department leadership in budget development• Lead periodic budget updates and public policy workshops intended to inform the Board and the public on key budget decision points.• Present recommended budget• Present budget ordinance consistent with straw vote direction
Outcome/Measures:	Successful accomplishment of established milestones.

Strategic Agenda: High Performing Organization Succession Planning Strategy	
Description:	Implement/Evaluate/Refine an employee succession planning strategy for the County.
Rationale:	County management has discussed the need for succession planning in prior years. As long tenured employees continue to retire and/or the job market continues to rebound and individuals seek opportunities elsewhere, it is in the County's best interest to build internal capacity to address future needs. In FY14, the County Manager approved a succession planning framework/strategy and several departments were identified to pilot this new model.
Timeline:	July 1, 2015
Updates/Project Milestones:	<p>The identified departments (Park and Recreation, Finance, Medical Examiner and DSS) will have a succession plan in place for implementation. The succession plans will include the following:</p> <ul style="list-style-type: none">• Identified department competencies• Identified critical positions• Identified position profile• Identified possible successors/pool• Completed individual profile for each person• Identified readiness• Successors completed their profile• Draft of the succession plan

Outcome/Measures:

- Successful accomplishment of established milestones.

**Strategic Agenda; High Performance Organization/Human Service Strategic Plan
Development/Implementation of Government Facilities Master Plan**

Description: Develop/Design/Implement initial phases of the Government Facilities Master Plan

Rationale: The Board has endorsed the County Manager's proposed strategy for reinventing the service delivery model for County Services. The core concept is to provide community centric service locations directly targeting the needs of individual communities and populations. The Government Facilities Master plan and associated property disposition strategies will enable the long term implementation of this plan.

Timeline: Multiple phases spanning 10 years.

Updates/Project Milestones:

- Develop strategic plan/present and gain approval of the Board
- Design Phase I implementation plan
- Communicate strategic and implementation plans to stakeholders
- Coordinate/align the County's capital improvement plan to established goals

Outcome/Measures:

- Successful accomplishment of established milestones.

**Strategic Agenda: High Performing Organization
Communication Plan**

Description: The Mecklenburg County Communication Plan outlines how the County communicates its strategic priorities, goals and information to residents, the Board of County Commissioners, County employees and other stakeholders. The plan also explains how the department is structured, how work is accomplished, and how success is measured.

Rationale: The mission of the Public Information Department is to "Tell Mecklenburg County's Story" to external and internal audiences.

The department achieves this mission through the following:

- Informing, educating, and engaging all residents and stakeholders regarding County programs, services and results
- Informing, educating and engaging County employees about the policies and procedures they need to know to be successful at their jobs and ambassadors for the County.

Timeline: The Communication Plan is an ongoing initiative. The specific tactics, outcomes and measures are subject to annual revision to ensure organizational objectives are met.

Updates/Project Milestones:

Include the following:

- List of key deliverables and corresponding dates
 - Key deliverable (milestone dates/timeframes).

Outcome/Measures:

- Communication awareness goals and customer satisfaction targets are set annually and questions included on the Annual Community Survey, Employee Climate Survey, Customer Satisfaction Survey and multiple services

Strategic Agenda: High Performing Organization Improve Fiscal Business Analysis, Forecasting, and Communication	
Description:	Increase the understanding of the County's current financial performance/fund balance position relative to the budget and economic trends. Upgrade the County's forecasting models to address short-term and long-range capital and operating planning needs. Expand the fiscal communication channels to increase transparency.
Rationale:	As the County seeks to implement its strategic objectives, it must have a good understanding of its fiscal resources and constraints. The horizon for this information extends beyond the traditional budget cycles and/or the long-range capital plan. County planners and directors must have confidence in this information to make informed decisions.
Timeline:	Continuous progress through June 30, 2015
Updates/Project Milestones:	<ul style="list-style-type: none"> Establish an ongoing, quarterly financial report for presentation to the full Board of Commissioners starting with FY2015 first quarter results Work with the Office of Management and Budget to create an ongoing budget to actuals reporting model Evaluate the fiscal forecasting model(s) and make recommendations for methodology refinement and expansion of model capabilities (including full integration of County activity; expansion of timeline) Canvass department heads on needed fiscal information and analysis. Find ways to enable these requests and create a continued dialogue to raise organizational awareness of fiscal and IT capabilities.
Outcome/Measures:	<ul style="list-style-type: none"> Public Financial Report to the Board of Commissioners – Begins 4th Quarter, 2014 Evaluation of anticipated FY15 Fund Balance (December 2014) with bi-monthly updates thereafter Increased responsiveness to requests for fiscal information and business analysis

Strategic Agenda: High Performing Organization Procurement Implementation	
Description:	Implement Procurement Services Division to provide services to County departments
Rationale:	<ul style="list-style-type: none"> Improve procurement process and compliance More efficient use of County resources
Timeline:	Will be implemented by June 30, 2016
Updates/Project Milestones:	<ul style="list-style-type: none"> Procurement Policy and Procedures developed and approved by Executive Team – February 2015 Procurement team hired Phase 1: Procurement services provided to departments – February 2015 E-procurement system testing and training Phase 2: Cataloguing available in E-procurement system to departments – June 2015 Phase 3: Fully integrated E-procurement system goes live – December 2015 Revise City-County Inter-local Agreement
Outcome/Measures:	<ul style="list-style-type: none"> Successful completion of established milestones Customer satisfaction Documented policies and procedures Increased utilization of procurement services Savings on County spend

Strategic Agenda: Quality of Life and Cost of Living Mecklenburg Livable Communities Plan	
Description: Mecklenburg Livable Communities is a collaborative plan that: <ol style="list-style-type: none"> 1) Identifies commonalities, overlaps, and gaps with existing plans throughout the various jurisdictions within Mecklenburg County 2) Provides policymakers a strategy to organize and communicate common goals and values that produce a better quality of life 3) Identifies opportunities to highlight unique municipal identity and character 4) Identifies opportunities for partnerships that increase outcomes and eliminate duplicative efforts and tear down silos 5) Increases community awareness of programs and policies that align to achieving the community's unified vision 	
Rationale: Mecklenburg County (along with the City of Charlotte and six Towns) has developed numerous localized plans and vision documents, but there does <u>not</u> exist a County-wide/Community unified vision or document that: <ul style="list-style-type: none"> • brings the existing plans and programs together • establishes goals and performance measures toward our future community • entails a robust community engagement approach to communicate between siloed efforts 	
Timeline: <ul style="list-style-type: none"> • Phase I: Create a Collaborative Community Vision August 2013 – April 2014 • Phase II: Develop a Collaborative Community Plan August 2014 – February 2015 	
Updates/ Project Milestones: <ul style="list-style-type: none"> ✓ The Vision & Guiding Principles were presented to all elected bodies. (FY14) • Solicit feedback from workgroup members, residents, subject matter experts and stakeholders • Present Community Plan to Elected Officials • Launch an Interactive Website of Community Plan • Develop an Implementation & Sustainability Plan 	
Outcome/ Measures: <ul style="list-style-type: none"> • Effectively oversee project lead's coordination and management of consultant team • Serve as an active participant on the project's Oversight Committee • Successful accomplishment of established milestones 	

Strategic Agenda: Quality of Life and Cost of Living Strategic & Business Planning Framework
Description: Establish a process for creating a multi-year strategic plan that will incorporate goals included in the Mecklenburg Livable Communities Plan, aligns department initiatives to corporate strategies, identifies upcoming business imperatives and links to the budget process
Rationale: Although the County has a Community & Corporate Scorecard with identified goals, strategies and measures, there are no supporting business plans. In addition, the County is currently participating in a multijurisdictional collaborative community visioning and planning process; the intent is for this plan to serve as the overarching tool for defining goals, managing performance and reporting outcomes from the community's perspectives.
Timeline: This a multi-year project; the following tasks and deliverables will be completed by June 2015.
Updates/ Project Milestones: <ul style="list-style-type: none"> ✓ Developed a Conceptual Framework • Present Conceptual Framework to Board of County Commissioners • Gap Analysis: Community Plan (Mecklenburg Livable Communities Plan)

<ul style="list-style-type: none"> • Department Key Initiatives & Performance Indicators • Strategic Planning Kick-off with Department Directors • Train-the-Facilitators Trainings • 1st Biennale County Report
Outcome/Measures: <ul style="list-style-type: none"> • Effectively direct/oversee Planning & Evaluation Manager's work • Successful accomplishment of established milestones

Strategic Agenda: Economic Development Code Enforcement Services Improvement
Description: Direct/Oversee improvements to the County's Code Enforcement customer service and permitting/inspections process.
Rationale: Community feedback suggests opportunity for improving the County's Code Enforcement Services. This includes but not limited to customer service, web presence, permitting/inspections,
Timeline: Final recommendations will be presented by December 2014. Implementation will follow and extend into FY2016
Updates/Project Milestones: (March – July) <ul style="list-style-type: none"> • Collaborate with the City of Charlotte on opportunities to improve processes across entities • Engage stakeholders in the dialogue on process improvements • Support the implementation of new technology to improve operational efficiency and reporting • Communicate regularly to the Board and public on the status of the project
Outcome/Measures: <ul style="list-style-type: none"> • Successful accomplishment of established milestones.

Strategic Agenda: Economic Development Economic Development Policy
Description: Develop an economic development policy that describes the County's role and identifies the Board of County Commissioners' goals and strategies for attracting new businesses, supporting existing businesses and promoting tourism
Rationale: The County does not currently have an Economic Development Policy.
Timeline: Project to be completed in FY2015
Updates/Project Milestones: <ul style="list-style-type: none"> ✓ The Board had an Economic Development Planning Retreat. (FY14) • Draft an outline/framework and present to Board's Economic Development Committee • Draft an Economic Development Policy and present to Board's Economic Development Committee and full Board
Outcome/Measures: <ul style="list-style-type: none"> • Successful accomplishment of established milestones

Strategic Agenda: Human Services Strategic Planning Consolidated Human Services Agency	
Description:	Provide policy direction and leadership to the consolidated human services agency.
Rationale:	This is the primary responsibility of the Health & Human Services Agency Director.
Timeline:	This is an ongoing task with no completion date.
Updates/Project Milestones:	<ul style="list-style-type: none"> • Work with the Human Services Agency Department Director's to draft and implement a Human Services Agency Strategic Plan with a specific focus on service delivery. • Present the Human Services Agency Strategic Plan to the County Manager by 6/30/2015. • Oversee the work of the Department Directors in the consolidated human services agency.
Outcome/Measures:	Successful achievement of established updates and project milestones.

Strategic Agenda: Human Services Strategic Planning Housing Stability Public/Private Partnerships Project	
Description:	Direct/oversee the continued implementation of the Housing Stability Public/Private Partnerships project.
Rationale:	People with complex unmet needs, histories of long-term homelessness, frequent incarcerations and untreated mental illness and addictions play a significant role in escalating mental health, substance abuse, criminal justice system and emergency service costs. Much of this cost is avoidable through more appropriate models of care that result in better individual and systemic outcomes. Offering stable housing with supportive services removes significant barriers for individuals and families.
Timeline:	<ul style="list-style-type: none"> • It is anticipated that the fund will be on-going as long as there is unmet need for housing subsidies and supportive services and there is data that demonstrates positive and cost effective outcomes. • The first round of funding was released in FY2014. Initial results will be available in FY2015.
Updates/Project Milestones:	<ul style="list-style-type: none"> • Supervise/oversee the implementation of the Housing Stability Public/Private Partnerships project. • Support the execution/implementation of the project. • Collaborate with partner non-profit agencies and the City of Charlotte to insure effective implementation with face-to-face and telephone meetings as necessary. • Communicate regularly the Board of Commissioners and the public on the status of the project.
Outcome/Measures:	Successful achievement of established updates and project milestones.

Individual Development Plan

Development Goal:
Professional development opportunities local government management and human resources will be identified and completed within the fiscal year.
Planned Actions/Resources:
Attend meetings of the NC City/County Managers Association Attend meetings of Women's Executives Attend Rotary Club meetings Attend CCOG Regional Manager meetings Attend meetings of ICMA and NACo Work with mentor Tom Lundy from Catawba County Develop and maintain relationships with local managers in and around Mecklenburg County

Leadership Competencies

Competencies	Definitions/Key Actions
Strategic Thinking	<p>Formulating vision into action</p> <ul style="list-style-type: none"> • Builds, communicates, and promotes a shared, long-term vision • Formulates strategies, objectives and priorities, and implements plans consistent with the vision • Identifies key issues based on logical assumptions, facts and data • Capitalizes on opportunities and manages risks • Understands the interdependency of the working, structure and culture of the organization as well as the social and economic issues/trends affecting the organization
Executive Excellence	<p>Optimizing talent management and financial health</p> <ul style="list-style-type: none"> • Attracts, develops, engages, and retains people • Creates a learning culture that encourages ownership and accountability by providing ongoing feedback and opportunities for continual learning for self, employees and teams • Assesses short-term and long-term fiscal condition; uses cost-benefit thinking to set and balance short-term and long-term priorities • Determines cost-effectiveness of programs and compares alternative strategies • Exemplifies good financial management
Change and Innovation	<p>Innovating through change and creativity</p> <ul style="list-style-type: none"> • Identifies, communicates and drives changes needed to adapt strategically to shifting demands, business conditions, technology, and internal initiatives • Questions conventional approaches; develops creative and innovative solutions to situations • Creates a shared responsibility among team members/staff and encourages others to seek different ideas/approaches to address organizational problems and opportunities and then embraces them • Rapidly adapts to changing conditions and communicates frequently and candidly during times of change • Designs, communicates and gains the acceptance of and leads the implementation of optimal, new or cutting edge ideas/processes to manage problems and opportunities
Collaborative Relationships	<p>Collaborating through alliances and relationships</p> <ul style="list-style-type: none"> • Identifies opportunities for, initiates, and maintains strategic relationships and networks in and out of the organization • Promotes openness and trust and builds confidence in one's intentions to achieve goals • Fosters an inclusive workplace by working effectively with individuals and groups of diverse cultures. • Utilizes the capabilities, insights, and ideas of individuals and groups to ensure the accomplishment of common business goals/improve results
Values and Integrity	<p>Serving with integrity and respect</p> <ul style="list-style-type: none"> • Models high standards, acting in accordance with moral, ethical, and professional standards, policies and regulations consistent with the County's Values and Guiding Principles • Demonstrates honesty, fairness, openness and being forthright, consistently, in words and actions, treating people with courtesy and respect • Respects the confidentiality of information and concerns shared by others